



1995-96

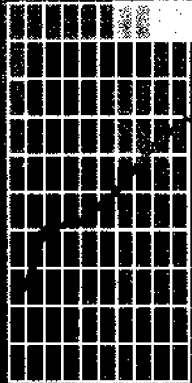
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Mining Industry

Australia

Preliminary

EMBARGO



NOTES

ABOUT THIS PUBLICATION

This publication presents preliminary establishment data from the Census of Mining Operations conducted with respect to the 1995-96 financial year, and some comparative statistics relating to 1994-95. Both the 1994-95 and 1995-96 Censuses included coal mining, oil and gas extraction and metal ore mining.

Detailed industry statistics will be provided in *Australian Mining Industry, 1995-96* (8414.0), to be issued later this year.

SYMBOLS AND ABBREVIATIONS

ABARE	Australian Bureau of Agricultural and Resource Economics
ABS	Australian Bureau of Statistics
ANZSIC	Australian and New Zealand Standard Industrial Classification
BRS	Bureau of Resource Sciences
n.e.c.	not elsewhere classified

Where figures have been rounded, discrepancies may occur between the sum of component items and the total.

INQUIRIES

For further information about statistics in this publication and the availability of related unpublished statistics, contact Helen Shannon on Adelaide (08) 8237 7382 or any ABS State office.

For information about other ABS statistics and services, refer to the back of this publication.

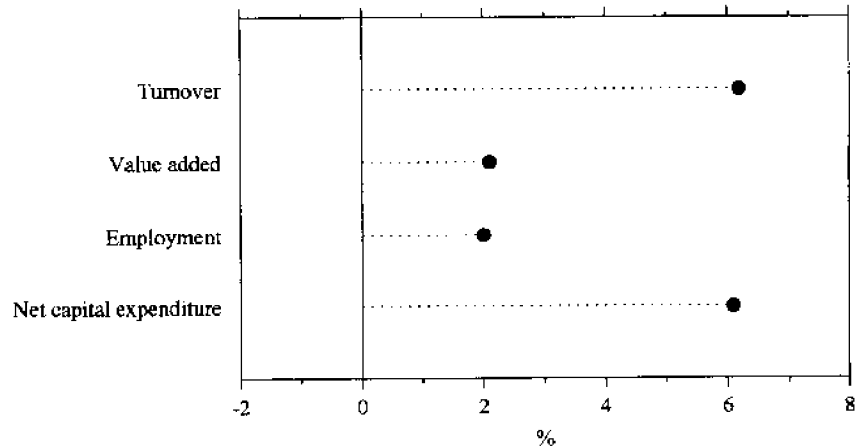
W. McLennan
Australian Statistician

SUMMARY OF FINDINGS

OVERVIEW

In 1995-96 turnover in the mining industry increased by 6% while value added rose by 2%. Turnover in 1995-96 was \$30,732 million compared with \$28,936 million in 1994-95. Employment rose by 2% while wages and salaries decreased by 1%. Net fixed capital expenditure rose by 6%.

PERCENTAGE CHANGE FOR SELECTED INDICATORS, 1994-95 TO 1995-96



In percentage terms New South Wales showed the greatest increase in turnover and value added over the 12 month period. Although Queensland reported an increase in turnover, it also reported a decrease in value added. Victoria was the only State to report a decrease in turnover.

INDUSTRY

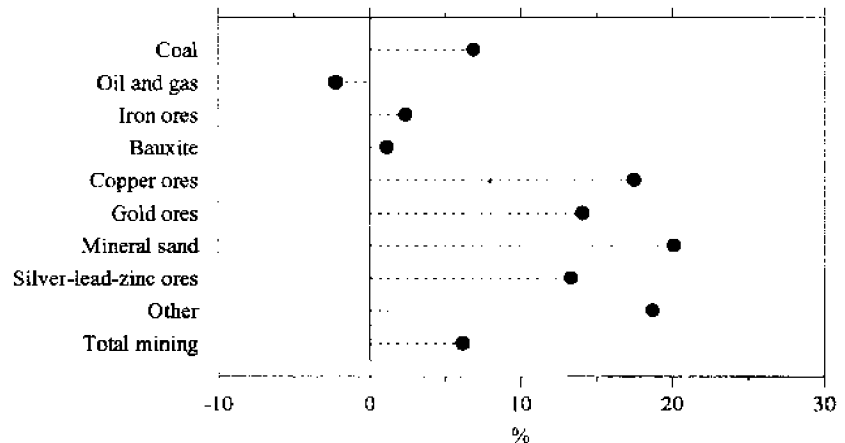
Turnover

All industries except oil and gas recorded increases in turnover. Increased production and higher prices were the main reasons for the increased turnover.

Turnover rose in the coal mining industry by \$647 million (7%) to \$9,989 million and in the gold mining industry by \$587 million (14%) to \$4,756 million. The mineral sand mining industry showed the largest percentage increase of 20% to \$758 million. Production decreases in the Victorian fields resulted in an overall decline in turnover in the Australian oil and gas extraction industry which fell by 2% to \$7,512 million.

The coal mining industry remained the largest contributor to total turnover for the mining industries, accounting for 33%. Contributions by other industries to total turnover were oil and gas extraction 24% and gold ore mining 15%.

PERCENTAGE CHANGE IN TURNOVER, 1994-95 TO 1995-96



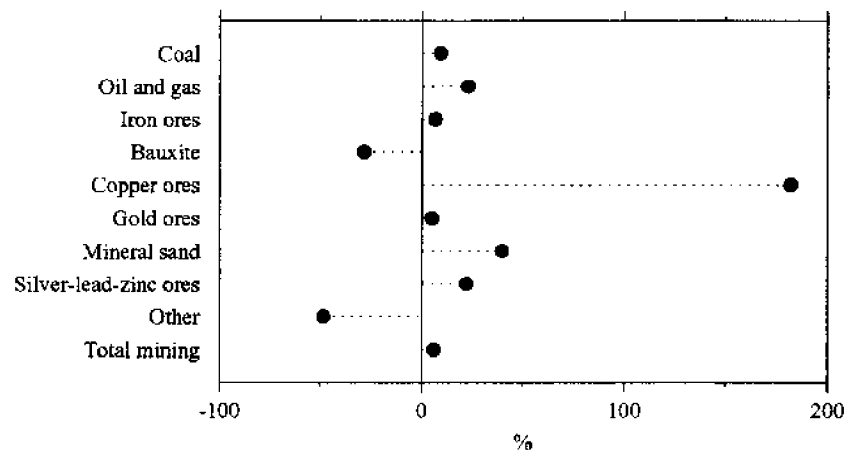
Net capital expenditure

Net capital expenditure (i.e. acquisitions less disposals) increased by \$288 million (6%) from \$4,698 million in 1994-95 to \$4,986 million in 1995-96.

The largest absolute increase in net capital expenditure occurred in the oil and gas extraction industry with a rise of \$282 million (23%) to \$1,509 million. Net capital expenditure in coal extraction increased by 9% to \$1,122 million. In metal ore mining, total net capital expenditure decreased by 4% to \$2,355 million with a 48% decrease in the other metal ore mining industry being the most significant factor. Increases occurred in all other metal ore mining industries with the exception of bauxite mining which decreased 29% to \$40 million. Copper ore mining exhibited the largest relative increase, 182% to \$184 million.

The oil and gas extraction industry accounted for the largest proportion of net capital expenditure, with 30% in 1995-96. The coal mining industry accounted for \$1,122 million (23%) and the gold mining industry, \$1,055 million (21%).

PERCENTAGE CHANGE IN NET CAPITAL EXPENDITURE, 1994-95 TO 1995-96



1

MINING OPERATIONS — ESTABLISHMENT LEVEL(a) — SUMMARY OF OPERATIONS

Items	Units	Coal mining		Oil and gas extraction		Iron ore mining		Bauxite mining		Copper ore mining		Gold ore mining	
		1994-95	1995-96	1994-95	1995-96	1994	95	1995-96	1994-95	1995-96	1994-95	1995-96	1994
INCOME AND EXPENDITURE													
Turnover(c)	\$m	9,341.9	9,988.6	7,681.4	7,511.5	3,103.0	3,178.0	856.3	866.5	1,019.0	1,197.2	4,169.4	4,756.2
<i>Plus</i>													
Closing stocks	\$m	741.5	804.4	238.9	287.6	279.5	321.6	40.3	44.4	150.5	121.7	570.8	670.9
<i>Less</i>													
Opening stocks	\$m	719.9	742.1	212.6	208.3	327.2	301.1	54.9	41.5	140.4	160.2	513.4	528.7
<i>Less</i>													
Purchases, transfers in, and selected expenses	\$m	4,226.2	5,079.3	715.9	700.5	1,101.7	1,213.5	287.5	297.5	351.5	474.8	2,147.0	2,489.0
Value added	\$m	5,137.3	4,993.1	6,991.9	6,890.9	1,953.7	1,982.9	554.1	572.4	677.7	700.6	2,079.9	2,408.8
FIXED CAPITAL EXPENDITURE													
Fixed capital expenditure less disposals	\$m	1,025.7	1,121.6	1,226.8	1,508.8	438.1	467.5	56.1	40.1	65.3	184.0	1,005.2	1,055.3
EMPLOYMENT DETAILS													
Establishments at 30 June	no.	162	175	96	92	21	22	10	10	14	19	153	186
Employment at 30 June(d)	no.	25,295	25,138	4,310	4,221	6,090	6,011	1,713	1,698	2,236	2,681	8,238	8,749
Wages and salaries(e)	\$m	1,829.7	1,759.4	329.7	291.6	402.0	375.2	91.7	92.4	132.8	147.8	413.2	448.7
MINERAL SAND AND SILVER-LEAD-ZINC ORE MINING													
Items	Units	Mineral sand mining		Silver-lead-zinc ore mining		Other metal ore mining(b)		Total metal ore mining		Total coal mining, oil and gas extraction and metal ore mining			
		1994-95	1995-96	1994-95	1995-96	1994-95	1995-96	1994-95	1995-96	1994	95	1995-96	
INCOME AND EXPENDITURE													
Turnover(c)	\$m	631.3	758.2	1,064.2	1,205.5	1,069.7	1,269.6	11,912.8	13,231.6	28,936.2	30,731.8		
<i>Plus</i>													
Closing stocks	\$m	142.3	159.2	114.3	158.5	284.0	292.9	1,581.6	1,769.5	2,562.0	2,861.7		
<i>Less</i>													
Opening stocks	\$m	152.4	152.2	145.8	119.6	255.1	303.1	1,589.2	1,606.8	2,521.6	2,557.3		
<i>Less</i>													
Purchases, transfers in, and selected expenses	\$m	310.7	347.7	472.0	600.1	450.7	552.6	5,121.0	5,975.5	10,063.1	11,755.4		
Value added	\$m	310.4	418.2	560.7	645.8	647.9	706.8	6,784.2	7,435.8	18,913.5	19,319.8		
FIXED CAPITAL EXPENDITURE													
Fixed capital expenditure less disposals	\$m	70.2	97.9	130.4	159.2	680.0	350.8	2,445.3	2,355.1	4,697.8	4,985.6		
EMPLOYMENT DETAILS													
Establishments at 30 June	no.	12	13	16	14	20	21	246	285	504	552		
Employment at 30 June(d)	no.	1,888	1,861	3,366	3,495	2,212	2,593	25,743	27,088	55,348	56,447		
Wages and salaries(e)	\$m	81.2	81.1	185.4	196.3	124.6	153.4	1,431.0	1,495.2	3,590.4	3,546.3		

(a) See Explanatory Notes, "Statistical units".

(b) Includes nickel ore mining.

(c) Includes transfers out to other establishments of the same management unit where appropriate.

(d) Includes working proprietors.

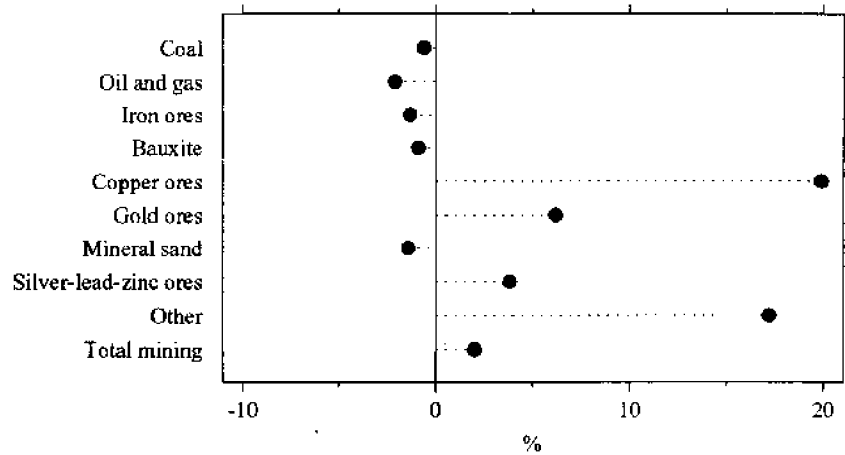
(e) Excludes amounts drawn by working proprietors.

Employment

Employment rose by 2% from 55,300 persons at 30 June 1995 to 56,400 persons at 30 June 1996.

The gold mining industry reported an increase of 6% to 8,700 persons. Increases in employment were also reported in copper ore mining, which rose by 20% to 2,700 persons and in other metal ore mining, which rose 17% to 2,600 persons. Decreases were reported for coal mining and oil and gas extraction, which fell 1% to 25,100 persons and 2% to 4,200 persons respectively.

PERCENTAGE CHANGE IN EMPLOYMENT, 1994-95 TO 1995-96



The coal mining industry had 45% of all mining employees. The gold ore mining industry and the iron ore mining industry, with 16% and 11% respectively were the other major employers of wage and salary earners.

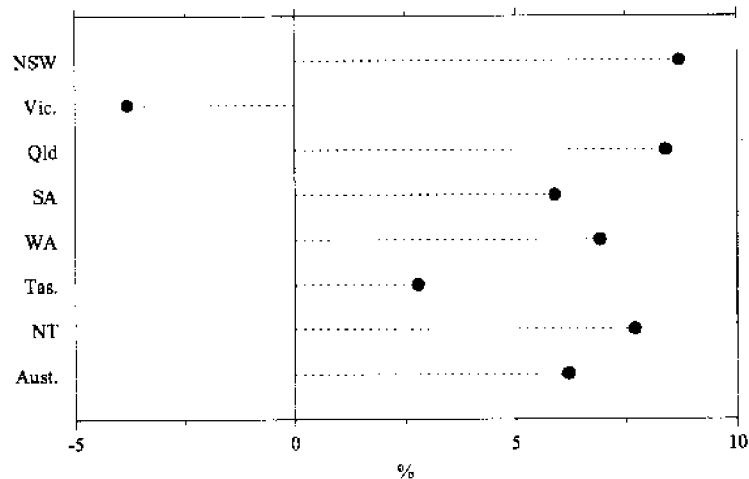
Wages and salaries fell by 1% from \$3,590 million in 1994-95 to \$3,546 million in 1995-96. The coal mining industry accounted for \$1,759 million (50%) of all wages paid.

STATE

Turnover

Western Australia was the largest contributor to national turnover accounting for 41%, or \$12,636 million in 1995-96. Queensland, with a turnover of \$7,227 million (24%) and New South Wales with \$4,987 million (16%) were ranked second and third respectively.

PERCENTAGE CHANGE IN TURNOVER, 1994-95 TO 1995-96



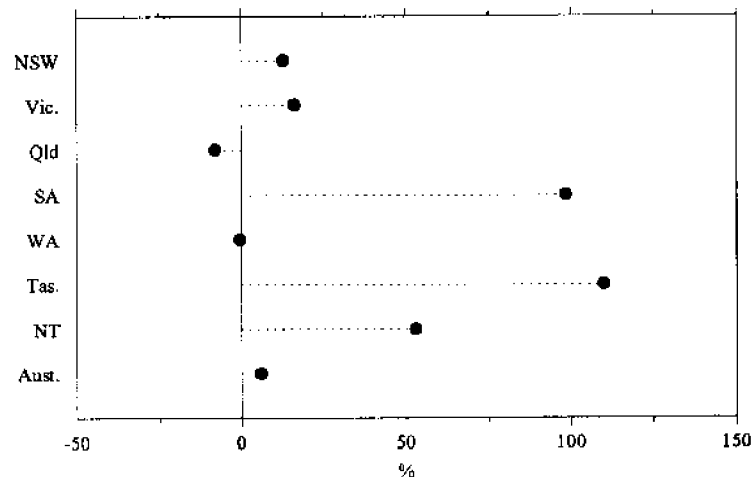
Western Australia recorded the largest absolute increase in turnover, rising by \$819 million to \$12,636 million in 1995-96 (up 7%). New South Wales recorded the largest relative increase in turnover rising from \$4,589 million to \$4,987 million (9%). Turnover in Victoria decreased by \$132 million (4%) to \$3,303 million as a result of reported decreases in the oil and gas extraction industry.

Net capital expenditure

Western Australia continued to be the largest contributor to net capital expenditure, accounting for \$2,606 million (52%) followed by New South Wales with \$700 million (14%).

Increases in net capital expenditure were recorded in all States with the exception of Queensland and Western Australia. Tasmania recorded the largest relative increase in net capital expenditure with a rise of 110% to \$94 million.

PERCENTAGE CHANGE IN NET CAPITAL EXPENDITURE, 1994-95 TO 1995-96

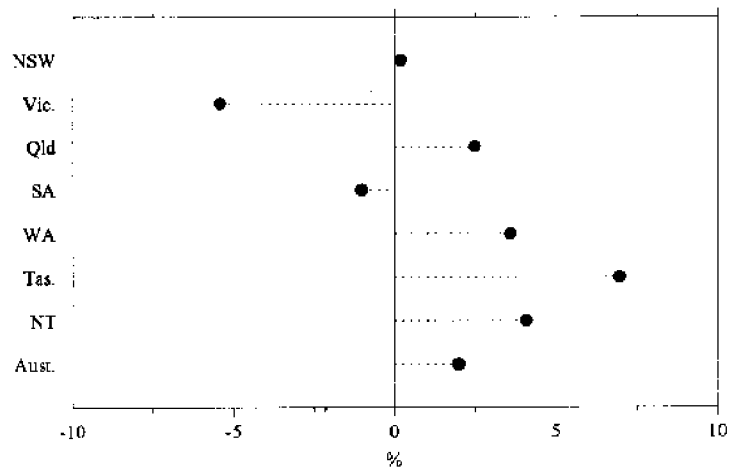


Employment

Employment in mining was concentrated in three States with Western Australia accounting for 34% of all mining employees, Queensland 27% and New South Wales 26%.

Employment at 30 June 1996 rose in most States. The largest increase occurred in Western Australia, from 18,736 persons at 30 June 1995 to 19,414 persons at 30 June 1996 (primarily in the gold ore mining industry). Queensland was also a significant contributor to the overall rise in employment with an increase of 371 persons to 15,127 persons at 30 June 1996.

PERCENTAGE CHANGE IN EMPLOYMENT, 1994-95 TO 1995-96



2

MINING OPERATIONS — ESTABLISHMENT LEVEL(a) — SUMMARY OF OPERATIONS BY STATE

Items	Units	New South Wales		Victoria		Queensland		South Australia	
		1994-95	1995-96	1994-95	1995-96	1994-95	1995-96	1994-95	1995-96
INCOME AND EXPENDITURE									
Turnover(b)	\$m	4,589.4	4,987.3	3,434.6	3,302.6	6,668.9	7,227.2	940.3	996.2
<i>Plus</i>									
Closing stocks	\$m	349.9	461.8	52.3	77.1	715.6	643.7	89.3	95.5
<i>Less</i>									
Opening stocks	\$m	380.1	368.8	41.4	70.6	707.0	663.1	77.1	92.3
<i>Less</i>									
Purchases, transfers in, and selected expenses	\$m	1,978.8	2,205.1	266.7	243.2	3,123.8	3,885.7	187.2	249.7
Value added	\$m	2,580.4	2,898.4	3,178.8	3,083.5	3,553.8	3,324.6	765.3	764.4
FIXED CAPITAL EXPENDITURE									
Fixed capital expenditure less disposals	\$m	619.6	699.8	565.6	657.8	676.9	624.7	68.5	136.0
EMPLOYMENT DETAILS									
Establishments at 30 June	no.	110	126	25	33	125	131	15	14
Employment at 30 June(c)	no.	14,869	14,902	2,036	1,926	14,756	15,127	2,123	2,101
Wages and salaries(d)	\$m	1,059.1	1,026.0	139.5	111.5	963.6	982.4	107.4	108.8
Items	Units	Western Australia		Tasmania		Northern Territory		Australia	
		1994-95	1995-96	1994-95	1995-96	1994-95	1995-96	1994-95	1995-96
INCOME AND EXPENDITURE									
Turnover(c)	\$m	11,816.8	12,635.7	371.0	381.2	1,115.2	1,201.4	28,936.2	30,731.8
<i>Plus</i>									
Closing stocks	\$m	1,076.8	1,294.9	49.4	57.2	228.7	231.1	2,562.0	2,861.7
<i>Less</i>									
Opening stocks	\$m	1,044.9	1,091.2	60.9	49.0	210.2	222.1	2,521.6	2,557.3
<i>Less</i>									
Purchases, transfers in, and selected expenses	\$m	3,981.6	4,545.7	149.4	170.3	375.5	455.4	10,063.1	11,755.4
Value added	\$m	7,867.0	8,289.9	210.1	217.6	758.1	761.2	18,913.5	19,319.8
FIXED CAPITAL EXPENDITURE									
Fixed capital expenditure less disposals	\$m	2,613.1	2,605.7	44.6	93.6	109.6	167.7	4,697.8	4,985.6
EMPLOYMENT DETAILS									
Establishments at 30 June	no.	189	208	9	9	31	31	504	552
Employment at 30 June(c)	no.	18,736	19,414	1,086	1,162	1,742	1,814	55,348	56,447
Wages and salaries(d)	\$m	1,140.2	1,138.4	77.0	67.1	103.6	111.9	3,590.4	3,546.3

(a) See Explanatory Notes, 'Statistical units'.

(b) Includes transfers out to other establishments of the same management unit where appropriate.

(c) Includes working proprietors.

(d) Excludes amounts drawn by working proprietors.

EXPLANATORY NOTES

INTRODUCTION

1 The statistics in this publication have been derived from the Census of Mining Operations. The Census provides annual financial statistics, which can be related to other industry sectors in Australia on a consistent basis.

2 The Census of Mining Operations is conducted as a component of the ABS integrated economic statistics framework. Data collected at the industry level within this framework conforms to the same basic conceptual standards, allowing comparative analysis between different industries and industry sectors.

REFERENCE PERIOD

3 The period covered by the Census is in general the 12 months ended 30 June. Where businesses are unable to supply information on this basis, the substitute accounting period is used for data other than that relating to employment.

SCOPE

4 The 1993 edition of the *Australian and New Zealand Standard Industrial Classification* (ANZSIC) (1292.0) has been used to classify management units (and establishments) included in the Census of Mining Operations.

5 Mining broadly relates to the extraction of minerals occurring naturally as solids such as coal and ores, liquids such as crude petroleum, or gases such as natural gas, by such processes as underground mining, open-cut extraction methods, quarrying, operation of wells or evaporation pans, dredging or recovering from ore dumps or tailings. Activities such as dressing or beneficiating ores or other minerals by crushing, milling, screening, washing, flotation or other processes (including chemical beneficiation) or briquetting, are included because they are generally carried out at or near mine sites as an integral part of mining operations. Natural gas absorption and purifying plants are also included.

6 Establishments mainly engaged in refining or smelting of minerals or ores (other than preliminary smelting of gold), or in the manufacturing of such products of mineral origin as coke, cement and fertilisers are excluded. Also excluded from the collection are any establishments with no employees (i.e. sole proprietors). These have been omitted because they are not expected to be statistically significant. Typical of these are itinerant and part-time miners, particularly in the gemstone industry and, to a lesser extent, in the copper and tin industries.

7 It should be noted that companies engaged in providing contract mining services are classified to 'services to mining' and are therefore not included.

8 The annual Census of Mining Operations covers the ANZSIC classes for coal mining, oil and gas extraction and metal ore mining. On a triennial basis, data are collected for construction material mining and mining n.e.c.

STATISTICAL UNITS

9 The establishment is the smallest accounting unit of a business, within a State or Territory, controlling its productive activities and maintaining a specified range of detailed data including data enabling calculation of value added. In general an establishment covers all operations at a physical location, but may consist of a group of locations provided they are within the same State or Territory and classified to a single industry. The majority of establishments operate at one location only.

10 Separately located administrative offices and ancillary units such as storage premises, laboratories and producers' sales branches continue to have their activities included with mining activities unless these ancillaries constitute a separate accounting unit, in which case they are defined as a separate establishment.

EXPLANATION OF
TERMS USED

11 In joint venture situations, and in recognition of AAS19, new establishments have been created for each venturer where an appropriate establishment operating in the same industry (ANZSIC) in the same State, did not already exist.

12 Despite the circumstances referred to above, the majority of establishments continue to cover the operations at a single physical location.

13 As the data presented in this publication have been compiled from the standard financial accounts of businesses, the definition of individually reported items aligns with those adopted in standard accounting practice.

RELATED PUBLICATIONS

14 For details of other related ABS publications to be issued, refer to the *Catalogue of Publications and Products* (1101.0). Copies of these publications are available at ABS Offices.

15 Mining and related statistics are contained in a number of other publications produced by the ABS, the Bureau of Resource Sciences (BRS) and the Australian Bureau of Agricultural and Resource Economics (ABARE). Users are also referred to the annual reports of the State Mines Departments, which contain mineral statistics.

16 A list of the ABS, BRS and ABARE publications may be found in the ABS publication *Australian Mining Industry, 1993-94* (8414.0).

17 Current publications produced by the ABS are listed in the *Catalogue of Publications and Products* (1101.0). The ABS also issues on Tuesdays and Fridays a *Release Advice* (1105.0) which lists publications to be released in the next few days. The *Catalogue* and the *Release Advice* are available from any ABS Office.

UNPUBLISHED STATISTICS

18 The statistics presented in this publication are only a small portion of the information which is available from the Census of Mining Operations. Unpublished information is generally made available on request, subject to it satisfying quality and confidentiality guide-lines associated with the release of such data. The charges for these services vary according to the time required to extract, tabulate and evaluate the data.

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